

# City of Gloucester Community Preservation Act

## APPLICATION AND PROJECT REVIEW INFORMATION

---

### APPLICATION AND REVIEW SCHEDULE

In 2015, Round 6, the Committee will follow this schedule:

Project Eligibility Forms due	January 30, 2015
Completed Applications due	March 16, 2015
<b>Estimated</b> Project Award	November/December, 2015

CPC recommendations are reviewed by the Mayor and approved by the City Council. The City Council approval process takes a **minimum** of two meetings of the Council. This timeframe cannot be accurately predicted; therefore the project award date above is only the committee's best estimate and subject to change.

The CPC may, under highly extraordinary circumstances, vote to accept applications that, because of market opportunities or other deadlines, require consideration outside of the normal funding cycles. Potential applicants who believe that their circumstances call for such unusual action may contact the CPC Chair to discuss the possible submission of an off-cycle submission.

### APPLICATION AND REVIEW PROCESS

The following describes the CPC's procedures for reviewing and recommending proposals, and the City's procedures for final approval and funding.

This section also details the precise information that the CPC needs in order to evaluate projects fully and to set priorities among them. Applicants who submit a late or incomplete application should expect the CPC to return the application for completion and resubmission at a future funding round.

The CPC supports the spirit and intent of state procurement and equal opportunity laws. All applicants will be evaluated in the same manner in accordance with the goals of the Community Preservation Act.

#### Step 1- Determine Project Eligibility

Due to the complexity of the CPA, the CPC requires all project applicants to begin the application process by submitting a one-page **Project Eligibility Determination Form**. Do not submit the full application until the Project Eligibility Determination Form has been submitted and approved.

Applicants should refer to the Community Preservation Fund Allowable Spending Purpose when filling out the Project Eligibility Determination Form. This information is available from the Department of Revenue and contains the most up-to-date information on both the definitions of the four CPA program areas (Open Space, Historical Preservation, Community Housing, and Recreation), and the allowed uses of CPA funds in the four areas.

Project Eligibility Determination Forms must be submitted at least 45 days in advance of the application deadline. Please submit one paper or one electronic copy to:

Community Preservation Committee  
c/o The Community Development Department  
3 Pond Road

The CPC will review Project Eligibility Determination Forms. Applicants will be notified as soon as possible whether their project is eligible for CPA funds.

Applicants with questions may contact the Community Development Department, Grants Division, at their office at 3 Pond Road, Gloucester (978-282-3027, ext #2). Information is also available on the City of Gloucester website at [www.gloucester-ma.gov](http://www.gloucester-ma.gov).

**If the applicant is a private individual or organization applying for CPA funds that involve working on city owned property you will need whichever department you are working with to sign the application as a co-applicant. You will also need a solid maintenance plan and funds for maintenance. You must contact Mark Cole, Assistant DPW Director, to discuss project feasibility and obtain DPW's recommendation and approval. You may contact Mark at 978 281 9785 or [mcole@gloucester-ma.gov](mailto:mcole@gloucester-ma.gov). If approval is not granted, then you cannot apply.**

## **Step 2 - Submit Completed Application.**

Please review both the **Requirements for Submission** and **Application Instructions** before beginning an application. Once submitted, an application may not be amended without a vote of the committee.

- Each project funding application must be submitted using the "Project Application Cover Sheet." Additional pages should be added as necessary.
- Applicants should **submit 12 paper copies of the application, double-sided, plus an electronic copy.**
- Submit applications to:

Community Preservation Committee  
c/o The Community Development Department  
3 Pond Road  
Gloucester MA 01930  
[dlaurie@gloucester-ma.gov](mailto:dlaurie@gloucester-ma.gov)

## **Step 3 - Community Preservation Committee Review and Public Comment**

**1. Application Review:** The CPC will review submitted applications on the basis of the General Evaluation Criteria and the Category Specific Evaluation Criteria for funding included in the Community Preservation Plan. All applicants should review the General Evaluation and Category Specific Criteria.

The CPC may request additional or more detailed information, and further clarifications to the submitted proposals. The CPC may request a legal opinion to help it assess CPA project eligibility and to provide answers to any other questions that the Committee may have.

**2. Project Review Meetings:** The CPC may ask applicants or their representatives to meet with the CPC to discuss questions that members might have regarding their applications.

**3. Public Comment Session:** Although members of the public may attend and speak at all meetings of the committee, the date of a formal Public Comment Session will be specified during each funding round. Applicants are encouraged to invite their supporters to attend this session.

**4. Notification:** The CPC will notify applicants of its decisions concerning recommendations.



### **Committee Recommendations:**

- a. The CPC will make its final recommendations for funding to the Mayor for submission to the City Council.
- b. The CPC reserves the right to attach conditions and to require additional agreements, such as preservation guarantees, as part of a funding recommendation.
- c. The CPC may recommend a project as proposed by the applicant, or may modify the project, or it may recommend partial funding or funding for only a portion or phase of the proposed project. The CPC's

recommendations may include detailed project scopes, conditions, and other specifications, as the CPC deems appropriate to ensure CPA compliance and project performance.

- d. If the applicant is a private individual or organization applying for CPA funds that involves working on city owned property, the CPA Committee will also include in their recommendation to the Mayor that the project must also be accepted by the City Council to approve the acceptance of goods and services on city land for their project. This will involve being referred by the City Council to their Planning and Development Committee. If the City Council does not approve the project work on city owned property, then the project cannot be awarded funds.
- e. If the project on city owned land includes construction, then prevailing wages will be required. You may contact Donna Compton, Purchasing Agent, at 978 281 9710 or [dcompton@gloucester-ma.gov](mailto:dcompton@gloucester-ma.gov).

#### **Step 4 - Mayoral Recommendation and City Council Vote**

The Mayor will send the CPC's recommendations to the City Council. City Council has the final authority to award funds from Gloucester's Community Preservation Act Fund. The City Council may approve; approve with a lower level of funding; or reject recommendations. Members of the public may speak in favor of or against specific recommendations at the public session preceding each Council meeting.

#### **Step 5 - Award Letter**

The CPC will issue award letters for projects approved by City Council, with information on the funding amount, funding conditions, project modification as voted by City Council (if any), Community Preservation staff contact information, and guidelines for project execution. Projects receiving CPA funding will be required to credit this source of funding in promotional materials and, whenever appropriate, at the project location. Signs indicating CPA support will be made available through the CPC.

#### **Step 6 - Disbursement and Monitoring of Funds**

CPA monies are public funds raised from dedicated Gloucester tax revenues and from State subsidies. Projects financed with CPA funds must comply with all applicable State and municipal requirements. Funds are administered and disbursed by the City of Gloucester.

For questions about procurements and other financial requirements and procedures applicants should contact the Purchasing Agent, Donna Compton, at 978- 281-9710.

Project oversight, monitoring, and financial control are the responsibility of the CPC or its designee. Questions in these areas should be directed to Debbie Laurie, Community Preservation Act Senior Project Manager via email at [dlaurie@gloucester-ma.gov](mailto:dlaurie@gloucester-ma.gov) or by calling 978-282-8004.

The CPC will require quarterly project status updates from CPA Fund recipients. The purpose of such updates is to track the progress of funded projects, and identify issues that may assist future applicants.

## **REQUIREMENTS FOR SUBMISSION**

The following requirements should be followed in preparing an application for CPA funding.

- Application packages are available at the Community Development Department, Grants Office, 3 Pond Road, Gloucester, and online at [www.gloucester-ma.gov](http://www.gloucester-ma.gov) then select "Government", then select "Boards & Commissions" then "Community Preservation Committee." If you need a copy in Word format contact Debbie Laurie, Project Manager at [dlaurie@gloucester-ma.gov](mailto:dlaurie@gloucester-ma.gov).
- All applicants must complete a **Project Eligibility Determination Form** no later than 45 days prior to the project application filing deadline.
- Project funding applications should specify the funding period, not to exceed three years.
- If submitting multiple applications, the applicant should indicate a priority ranking of the projects.

- An application for support of a project that requires preservation guarantees should specifically address how such a guarantee will be secured. CPC is available as a resource. **For awards for the preservation, rehabilitation, or restoration of an historic asset, the awardee may be required to sign a preservation easement restriction as a condition of the award (see attached Appendix IV “SAMPLE Preservation Easement Restriction”).**
- For Historic Resources, documentation that the building, structure, vessel, real property, document or artifact is listed on the state register of historic places or has been determined by the local historic commission to be significant in the history, archeology, architecture or culture of a city or town. You may contact: Debbie Laurie for further information or questions.
- Applicants should include itemized project budgets, with details describing each item and its estimated cost.
- Applicants should obtain at least two professionally prepared detailed quotes for project costs whenever possible. If such quotes are not available, detailed cost estimates prepared by a qualified professional may be used provided the basis of the estimates is fully explained.
- The property owner, when applicable, should sign applications.
- If the funding application is part of a larger project, the applicant should include the total project cost.

## THE COMMUNITY PRESERVATION COMMITTEE

Members of the Committee are available to guide you with further information regarding the Community Preservation Act, the Community Preservation Plan priorities, and the funding process.

<u>Member</u>	<u>Representing</u>	<u>Contact information</u>
Sandy Dahl Ronan	Co-Chair At-large	famtherapy@verizon.net
J.J. Bell	Co-Chair At-large	j.j.bell@hotmail.com
David Rhinelander	Historical Commission	davidrx@aol.com
John Feener	Conservation Commission	thetreedoc@me.com
Bill Dugan	Housing Authority	wdugan4@yahoo.com
Karen Gallagher	Planning Board	kag1107@comcast.net
Charles Crowley	Open Space & Recreation	charlie@topdogstudio.com
Scott Smith	Community At-large	scott.smith@nemoves.com
Stacy Randell	Community At-large	srandell1@verizon.net

You may also contact the Community Development Department, Grants Office at 978-282-8004.

# CITY OF GLOUCESTER COMMUNITY PRESERVATION ACT ELIGIBILITY DETERMINATION FORM

The purpose of this form is to make sure that all project applications applying for Community Preservation Act funding meet basic requirements of CPA. **This form must be approved in order for an application to be accepted.**

Project Title: Feasibility study for housing at St. John's Episcopal Church	
Project Sponsor/Organization: St. John's Episcopal Church	
Contact Name: Astrid afKlinteberg, Gwen Kopka, wardens; Bret Hays, rector	
Mailing Address: 48 Middle Street Gloucester MA 01930	
Daytime phone #: 978-283-1708	Fax #978-283-1770:
E-mail address: bret.hays@gmail.com	

CPA Program Area:  <input type="checkbox"/> Open Space <input type="checkbox"/> Historic Preservation <input checked="" type="checkbox"/> Community Housing <input type="checkbox"/> Recreation
Project Purpose:  <input type="checkbox"/> Acquisition <input checked="" type="checkbox"/> Creation <input type="checkbox"/> Preservation <input type="checkbox"/> Support <input type="checkbox"/> Rehabilitation/Restoration

<p>Project Summary: Please provide a brief description of the project.</p> <p>St. John's is applying for \$15,000 in a CPA grant to fund a feasibility study for construction of mixed-income housing on our parking lot area on Washington Street. The parking lot area is approximately 22,000 square feet, spread over three contiguous lots. The church did a preliminary study in 2011 resulting in a survey of the site, and would like to examine in detail whether or not a multi-family, mixed-use project is feasible at the site. The project would contribute to the Community Preservation Act stated goal to acquire, create, preserve, and support community housing.</p> <p>The church has approximately \$5,000 to contribute to the cost of the study, which, it is hoped, will produce the following:</p> <ul style="list-style-type: none"><li>• Identify technical issues with the site, both legal and environmental.</li><li>• Determine the permitting process.</li><li>• Estimate costs and outline methods of financing through grants, low-interest loans and other methods.</li><li>• Preliminary design drawings</li></ul> <p>If the project proves feasible the church would apply for further CPA and other housing grants in a future cycle.</p> <p>Please see attachment B (draft Request for Proposal) for details on the scope of the study.</p>
---

<b>Estimated total budget for project:\$20,000</b>
<b>Estimated CPA funding request:\$15,000</b>

**For CPC Use** Eligible: \_\_\_\_\_ Not Eligible: \_\_\_\_\_ Date: \_\_\_\_\_ Reviewer: \_\_\_\_\_

# CITY OF GLOUCESTER COMMUNITY PRESERVATION COMMITTEE PROJECT APPLICATION COVER SHEET

## I: Project Information

Project Title: Feasibility study for housing at St. John's Episcopal Church

### Project Summary:

St. John's is applying for approximately \$15,000 in a CPA grant to fund a feasibility study for construction of mixed-income housing on our parking lot area on Washington Street. The parking lot area is approximately 22,000 square feet, spread over three contiguous lots. The church did a preliminary study in 2011 resulting in a survey of the site, and would like to examine in detail whether or not a multi-family, mixed-use project is feasible at the site. The project would contribute to the Community Preservation Act stated goal to acquire, create, preserve, and support community housing.

The church has approximately \$5,000 to contribute to the cost of the study, which, it is hoped, will produce the following:

- Identify technical issues with the site, both legal and environmental.
- Outline the permitting process.
- Estimate costs and outline methods of financing through grants, low-interest loans and other methods.
- Preliminary design drawings

If the project proves feasible the church would apply for further CPA and other housing grants in a future cycle. Please see attachment B (draft Request for Proposal) for details on the scope of the study.

Estimated start date: 1/1/16      Estimated completion date: 4/1/16

### CPA Program Area:

- ☐ Open Space      ☐ Historic Preservation  
☒ Community Housing      ☐ Recreation

## II: Applicant/Developer Information

Contact Person with primary responsibility for project: The Rev. Bret B. Hays, rector

Organization (if applicable): St. John's Episcopal Church

Mailing Address: 48 Middle Street, Gloucester MA 01930

Daytime phone #: 978-283-1708

Fax #: 978-283-1770

E-mail address: housing@stjohnsgloucester.org

Federal ID# 04-2197702

## III: Budget Summary

Total budget for project: \$20,000

CPA funding request: \$15,000

CPA request as percentage of total budget: 75%

**Applicant's Signature:** \_\_\_\_\_

**Printed name and Position:** Bret B. Hays, Rector, St. John's Episcopal Church

# CPA APPLICATION INSTRUCTIONS

**1. Please read the entire CPA Application & Review Process before beginning.**

**2. Complete the Application Cover Sheet.**

**3. Include the following information:**

- **Narrative:** A description of the project and, when applicable, of the property involved and its proposed use. Include responses to the following questions:
  - What Community Preservation criteria – both general and category specific – does this project meet?
  - What community need(s) does this project serve? If the project serves multiple needs and populations, please describe them. If the project serves a population that is currently underserved, please describe.
  - What specific guarantees will assure the long-term preservation of the project? Describe the nature and level of community support for the project.
  - How will the success of this project be measured?
  - Is ongoing maintenance and upkeep required? If yes, please explain how this will be accomplished.
- **Project Budget:** Please provide the total budget for this project, including detailed costs and specifically how CPA funds will be spent (See Budget Form). All items of expenditure must be clearly identified. Include project quotes, or show why this is not appropriate or feasible. List any additional funding sources, either committed or under consideration. Include commitment letters if available.

If the application submission is for a community housing project, please submit a development budget and a sources and uses budget. Also, community housing home ownership projects shall include an affordability analysis, and community housing rental projects shall include a five-year operating budget.
- **Multi-Year Funding:** If the project is expected to continue over more than one year, or if bonding the project is anticipated, please provide annual funding requirements.
- **Project Timeline:** Explain the various steps of the project and when they will be completed. (**See Project Schedule Form**).
- **Feasibility:** List and explain all further actions or steps that will be required for completion of the project, such as environmental assessments, zoning or other permits and approvals, agreement on terms of any required conservation, affordability or historic preservation agreements, subordination agreements, and any known or potential barriers or impediments to project implementation.
- **Maps:** USGS topographical map, assessors map, or other map as appropriate, showing location of the project.
- **Visual materials:** Photographs, renderings or design plans of the site, building, structure or other subject for which the application is made.
- **Applicant Qualifications:** Explain your ability to carry out the project.

**Any questions, feel free to contact us.**

**4. Include the following attachments, if applicable and available:**

- Record plans of the property:
  - **See Attachment A.**
- Natural resource features. (Please include resources subject to the Wetlands Protection Act.).
  - **Not applicable.**
- Zoning (district, dimensional and use regulations as applies to the land)
  - **The parcels are zoned R5.**

- Inspection reports.
  - ***Not applicable.***
- 21E Reports and other environmental assessment reports.
  - ***Not applicable.***
- For historic properties or artifacts, Massachusetts Historic Commission Historic inventory sheet indicating a National Register designation or a determination made by the Gloucester Historical Commission.
  - ***Not applicable.***
- Historic structure report or existing condition reports.
  - ***Not applicable.***
- The applicant for funds for historic preservation, rehabilitation or restoration should submit a statement regarding their willingness to sign a preservation restriction, if required by the CPC as a condition of the award.
  - ***Not applicable.***
- Names and addresses of project architects, contractors, and consultants. ***Not applicable.***
- Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed.
  - ***Not applicable.***
- Proof of specific site control, or plan to obtain site control such as Purchase and Sale Agreement, option, or deed.
  - **See Attachment C.**
- Evidence that the proposed site is free of hazardous materials or that there is a remediation plan in place. CPA funds can be used for mitigation.
  - **This is part of the proposed feasibility study.**
- Letters of support sufficient to document clear endorsement by community members and groups, and where appropriate, by municipal boards, committees and commissions, and departments. Affordable housing trust will meet next week to consider a letter of support.
  - See attachmentE.
- Any other information useful for the Committee in considering the project.
  - Photo of Property. See attachment D
  - Preliminary Cost Estimates--**See attachment E.**



# CITY OF GLOUCESTER

## COMMUNITY PRESERVATION COMMITTEE

### APPLICATION EVALUATION CRITERIA

#### GENERAL EVALUATION CRITERIA

All projects must be eligible for the Community Preservation Act (CPA) funding according to the requirements described in the CPA legislation (Chapter 44B of Massachusetts General Laws). The Gloucester Community Preservation Committee gives preference to proposals which address as many of the following general criteria as possible:

1. Consistent with various plans which are relevant to and utilized by the City regarding Open Space, Recreation, Historic Resources and Affordable Housing.
2. Preserve and enhance the essential character of the City.
3. Protect resources that would otherwise be threatened.
4. Serve more than one CPA purpose or demonstrate why serving multiple needs are not feasible.
5. Demonstrate practicality and feasibility, and that the project can be implemented within budget and on schedule.
6. Produce an advantageous cost/benefit value.
7. Leverage additional public and/or private funds (e.g. qualify the project for additional grants from other sources) or receive partial funding from other sources and/or voluntary contributions of goods or services.
8. Preserve or improve use or intended purpose of City-owned city assets.
9. Receive endorsement by other municipal boards, committees and commissions or departments and broad-based support from community members.

#### CATEGORY SPECIFIC CRITERIA

In addition to the general evaluation criteria outlined in the overview section, the Community Preservation Act funds the community preservation interests in Open Space, Historic Preservation, Affordable Housing and Recreation.

1. **Open Space** proposals will be evaluated according to the following specific criteria:
  - Permanently protect important wildlife habitat, particularly areas that include:
    - locally significant biodiversity;
    - variety of habitats with a diversity of geologic features and types of native and noninvasive vegetation;
    - Threatened or endangered habitat or species of plant or animal.
  - Preserve active agricultural use.
  - Provide opportunities for passive recreation and environmental education.
  - Protect or enhance wildlife corridors, promote connectivity of habitat or prevent fragmentation of habitats.
  - Provide connections with existing trails or protected open space.
  - Acquire land or easements for potential trail linkages.
  - Preserve scenic views.
  - Border a scenic road.
  - Protect drinking water quantity and quality.
  - Provide flood control/storage.
  - Preserve and protect important surface water bodies, including streams, wetlands, vernal pools, riparian zones or Areas of Critical Environmental Concern (ACEC).
  - Buffer for protected open space, or historic resources.
2. **Historic Preservation** proposals which address as many of the following criteria as possible will receive preference for funding:
  - Protect, preserve, enhance, restore and/or rehabilitate historic, cultural, architectural or archaeological resources of significance, especially those that are threatened.
  - Protect, preserve, enhance, restore and/or rehabilitate city-owned properties, features or resources of historical significance.
  - Protect, preserve, enhance, restore and/or rehabilitate the historical function of a property or site.

- Demonstrates a public benefit.
- Ability to provide permanent protection for the historic resource.

**3. Affordable Housing** proposals which address as many of the following criteria as possible will receive preference for funding:

- Contribute to the goal of 10% affordability as defined by chapter 40B of Massachusetts General Laws.
- Promote a socioeconomic environment that encourages a diversity of income.
- Provide housing that is harmonious in design and scale with the surrounding community.
- Intermingle affordable and market rate housing at levels that exceed state requirements for percentage of affordable units pursuant to chapter 40B.
- Ensure long-term affordability.
- Address the needs of a range of qualified households, including very low, low and low-to moderate income families and individuals.
- Provide for individuals with special needs and who require assisted living.
- Provide affordable rental and affordable ownership opportunities.
- Promote use of existing buildings or construction on previously-developed or city-owned sites.
- 

**4. Recreation** proposals will be evaluated with the following criteria:

- Address a need or objective identified in a City Plan
- Serve a significant number of residents
- Preserve and expand the range of recreational opportunities available to city residents of all ages and abilities, including those at-risk of obesity as identified through the Get Fit Gloucester! Community Action Plan.
- Promote recreational activities.
- Maximize the use of land already owned by city
- Promote the creative use of railway and other corridors to create safe and healthful non-motorized transportation opportunities.
- Preserve and enhance the natural wildlife habitat functions and values of open space for wildlife.

# CITY OF GLOUCESTER

## community preservation committee

---

### Project Schedule

---

Please provide a project timeline below, noting all project milestones. Please note that because the City Council must approve all appropriations, CPA funds may not be available until up to two months following Committee approval.

	Activity	Estimated Date
<b>Project Start Date:</b>	<b>Publish request for proposals for study</b>	<b>12/1/15</b>
<b>Project Milestone:</b>	<b>Award contract for feasibility study</b>	<b>1/15/16</b>
<b>50% Completion Stage:</b>	<b>Receive report of consultant</b>	<b>3/1/16</b>
<b>Project Milestone:</b>	<b>Evaluate report, make decision on whether to proceed.</b>	<b>4/15/16</b>
<b>Project Completion Date:</b>		<b>4/15/16</b>

Please note: If the project is approved, the recipient must provide progress reports to the Committee on a quarterly basis (by the 15<sup>th</sup> of January, April, July and October) depending on the length of the project. The recipient shall also provide an interim report at the 50% Completion Stage, along with budget documentation.

Please feel free to photocopy or re-create this form if more room is needed.

# CITY OF GLOUCESTER

## community preservation committee

---

### Budget Form

---

**Project Name: St. John's Church housing feasibility study**

**Applicant: St. John's Episcopal Church**

SOURCES OF FUNDING		
Source	Amount	
Community Preservation Act Fund	\$15,000	
Episcopal City Mission grant (in hand)	\$5,000	
<b>Total Project Funding</b>	<b>\$20,000</b>	
PROJECT EXPENSES		
Expense	Amount	Please indicate which expenses will be funded by CPA Funds:
Cost of feasibility study	\$20,000	75% CPA, 25% church grant
<b>Total Project Expenses</b>	<b>\$20,000</b>	

Please feel free to photocopy or re-create this form if more room is needed.

## APPENDIX I: CPA INFORMATION GUIDE

---

- As part of the Community Preservation Act in Gloucester, the City Council created the Community Preservation Committee. The ordinance which the Council approved can be found on the City's website, [www.gloucester-ma.gov](http://www.gloucester-ma.gov)
- The Community Preservation Coalition, of which the Gloucester CPC is a member, is an alliance of open space, affordable housing, and preservation organizations that works with municipalities to help them understand, adopt, and implement the CPA. The Coalition website has a wide variety of information, including links to the other CPA communities. See <http://www.communitypreservation.org/index.cfm>. Furthermore, the "Links" page offers helpful CPA related connections to many agencies and organizations - <http://www.communitypreservation.org/links.cfm>
- It is important for every applicant, and useful for anyone else interested in the Community Preservation Act, to read the actual legislation. (Chapter 44B, Commonwealth of Massachusetts General Laws.)  
<http://www.mass.gov/legis/laws/mgl/gl-44b-toc.htm>
- There are a number of relevant Planning documents that provide guidance on values and priorities that have been identified by the citizens of Gloucester. These include:
  - "A Comprehensive Plan, the Community Development Plan for the City of Gloucester, 2001"
  - "The City of Gloucester's Open Space Plan, 2010"
  - "The Harbor Plan/Designate Port Area Master Plan 2009"
  - "City of Gloucester Housing Element 2004"
  - "City of Gloucester Consolidated Plan/ Annual Action Plan, 2010 – 2015"
  - "A Preservation Plan for the City of Gloucester, 1990"

These Plans can be found on the City's website, [www.gloucester-ma.gov](http://www.gloucester-ma.gov), **and/or** at the City's Community Development Department, 3 Pond Road.

## APPENDIX II: GLOSSARY OF TERMS

---

### TERMS FROM THE MASSACHUSETTS COMMUNITY PRESERVATION ACT

As used in this act, the following words shall, unless the context clearly indicates a different meaning, have the following meanings:

**"Acquire"**, obtain by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. "Acquire" shall not include a taking by eminent domain, except as provided in this chapter.

**"Annual income"**, a family's or person's gross annual income less such reasonable allowances for dependents, other than a spouse, and for medical expenses as the housing authority or, in the event that there is no housing authority, the department of housing and community development, determines.

**"Capital Improvement"**, reconstruction or alteration of real property that: (1) materially adds to the value of the real property or appreciably prolongs the useful life of the real property; (2) becomes part of the real property or is permanently affixed to the real property so that removal would cause material damage to the property or article itself; and (3) is intended to become a permanent installation or is intended to remain there for an indefinite period of time.

**"Community housing"**, low and moderate income housing for individuals and families, including low or moderate income senior housing.

**"Community preservation"**, the acquisition, creation and preservation of open space, the acquisition, creation and preservation of historic resources and the creation and preservation of community housing.

**"Community preservation committee"**, the committee established by the legislative body of a city or town to make recommendations for community preservation, as provided in section 5.

**"Community Preservation Fund"**, the municipal fund established under section 7.  
"CP", community preservation.

**"Historic resources"**, a building, structure, vessel, real property, document or artifact that is listed on the state register of historic places or has been determined by the local historic preservation commission to be significant in the history, archeology, architecture or culture of a city or town.

**"Legislative body"**, the agency of municipal government which is empowered to enact ordinances or by-laws, adopt an annual budget and other spending authorizations, loan orders, bond authorizations and other financial matters and whether styled as a city council, board of aldermen, town council, town meeting or by any other title.

**"Low income housing"**, housing for those persons and families whose annual income is less than 80 per cent of the area wide median income. The area wide median income shall be the area wide median income as determined by the United States Department of Housing and Urban Development.

**"Low or moderate income senior housing"**, housing for those persons having reached the age of 60 or over who would qualify for low or moderate income housing.

**"Maintenance"**, incidental repairs which neither materially add to the value of the property nor appreciably prolong the property's life, but keep the property in a condition of fitness, efficiency or readiness.

**"Moderate income housing"**, housing for those persons and families whose annual income is less than 100 per cent of the area wide median income. The area wide median income shall be the area wide median income as determined by the United States Department of Housing and Urban Development.

**"Open space"**, shall include, but not be limited to, land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.

**"Preservation"**, protection of personal or real property from injury, harm or destruction.

**"Real property"**, land, buildings, appurtenant structures and fixtures attached to buildings or land, including, where applicable, real property interests.

**"Real property interest"**, a present or future legal or equitable interest in or to real property, including easements and restrictions, and any beneficial interest therein, including the interest of a beneficiary in a trust which holds a legal or equitable interest in real property, but shall not include an interest which is limited to the following: an estate at will or at sufferance and any estate for years having a term of less than 30 years; the reversionary right, condition or right of entry for condition broken; the interest of a mortgagee or other secured party in a mortgage or security agreement.

**"Recreational use"**, active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field. "Recreational use" shall not include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.

**"Rehabilitation"**, capital improvements, or the making of extraordinary repairs to historic resources, open spaces, lands for recreational use and community housing for the purpose of making such historic resources, open spaces, lands for recreational use and community housing

functional for their intended uses, including, but not limited to improvements to comply with the Americans with Disabilities Act and other federal, state or local building or access codes; provided that with respect to historic resources, “rehabilitation” shall comply with the Standards for Rehabilitation stated in the United States Secretary of the Interior's Standards for the Treatment of Historic Properties codified in 36 C.F.R. Part 68; and provided further, that with respect to land for recreational use, “rehabilitation” shall include the replacement of playground equipment and other capital improvements to the land or facilities thereon which make the land or the related facilities more functional for the intended recreational use.

“Support of community housing”, shall include, but not limited to, programs that provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing or to an entity that owns, operates or manages such housing, for the purpose of making housing affordable.



## APPENDIX III: ALLOWABLE USE TABLE

### COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSE (G.L. c. 44B, § 5)

	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
<b>DEFINITIONS</b> (G.L. c. 44B, § 2)	Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grass lands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the local historic preservation commission to be significant in the history, archeology, architecture or culture of the city or town	Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field  Does <u>not</u> include horse or dog racing or the use of land for a stadium, gymnasium or similar structure	Housing for low and moderate income individuals and families, including low or moderate income seniors  Moderate income is less than 100% and low income is less than 80%, of US HUD Area Wide Median Income
<b>ACQUISITION</b> Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B	Yes	Yes	Yes	Yes
<b>CREATION</b> To bring into being or cause to exist. <i>Seideman v. City of Newton</i> , 452 Mass. 472 (2008)	Yes	NA	Yes	Yes
<b>PRESERVATION</b> Protect personal or real property from injury, harm or destruction	Yes	Yes	Yes	Yes
<b>SUPPORT</b> Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable	NA	NA	NA	Yes, includes funding for community's affordable housing trust
<b>REHABILITATION AND RESTORATION</b> Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties	Yes, if acquired or created with CP funds	Yes	Yes	Yes, if acquired or created with CP funds

ATTACHMENT A: PLAN OF PROPERTY



**St. John's Episcopal  
Church**

**48 Middle St.**

**Gloucester, Massachusetts 01930**

Telephone 978 283 1708 Fax 978 283 1770

[www.stjohnsgloucester.org](http://www.stjohnsgloucester.org)

**Request for Proposals # 2015-001**

for

**Feasibility study for constructing of low- to  
moderate-income housing on Church property**

Issued: ..... , 2015

Pre-response meeting (if necessary): ..... 2015

Opening Date: ..... 2015

Award of Contract ..... Autumn 2015\*

**ST JOHN'S EPISCOPAL CHURCH  
48 MIDDLE STREET GLOUCESTER MA 01930.  
REQUEST FOR PROPOSAL**

**SERVICE DESCRIPTION**

St. John's Episcopal Church is seeking proposals, **RFP 2015-001**, from qualified consultants or developers to study the feasibility of creating multi-unit low- to moderate-income housing on land owned by the church at 33, 35 and 35R Washington Street in Gloucester Mass. The land consists of three contiguous parcels:

- 33 Washington St. (Book 5496, Page 604 in the Southern Essex Registry of Deeds.)
- 35 Washington St (Map 5502, Page 65 in the Southern Essex Registry of Deeds.)
- 35R Washington St (Map 5241, Page 340 in the Southern Essex Registry of Deeds.)

The three parcels have been surveyed and a surveyor's map is available for review at the Church office.

**The scope of services will include all tasks described in Section 6.**

The contract will be awarded and the work carried out in the fall and winter of 2015-2016, and depends upon receipt of a Community Preservation Act grant from the City of Gloucester.

**SECTION 1.01 RFP AVAILABILITY**

Proposal documents will be available on **XXX XX, 2015** at the Church Office 48 Middle St., Gloucester, MA.

**SECTION 1.02 PRE-RESPONSE MEETING**

A pre-response meeting with interested parties, if required, will be held. at the Church Office 48 Middle St., Gloucester, MA on **XXX XX, at 11 a.m.**

**SECTION 1.03 RFP OPENING**

Proposals will be **opened** on **XXX XX 2015**, at 11 a.m. at the Church Office 48 Middle St., Gloucester, MA.

**SECTION 1.04 LATE SUBMISSIONS**

The church shall not be responsible for proposals arriving late due to couriers, deliveries to wrong locations, express mailing services.

**SECTION 1.05 CANCELLATION OF OPENING**

If the Church office is closed due to an emergency or winter weather conditions, scheduled bid openings will be postponed to the first day the church office is open to conduct normal business functions. The time and location of the opening will be the same as originally scheduled in the Request for Proposals.

**SECTION 1.06 RIGHT TO WITHDRAW**

A proposer has the right to withdraw his/her bid anytime prior to the time fixed for opening. A request to withdraw must be in writing.

**SECTION 1.07 REQUESTING INFORMATION**

Any prospective proposer requesting a change in or interpretation of existing specifications of terms and conditions must do so at least (5) days, excluding Saturdays, Sundays and Holidays, before the scheduled proposal opening date. All requests are to be in writing, email: [housing@stjohnsgloucester.org](mailto:housing@stjohnsgloucester.org) or faxed to the church office (978-283-1770). If necessary to maintain a fair, equal and competitive environment, the church will issue addenda to all vendors who have requested the RFP package.

**SECTION 1.08 INCOMPLETE PROPOSAL**

\*Awarding and date of contract is contingent upon receiving a grant from the City of Gloucester under the Community Preservation Act

Any RFP that is not according to prescribed form, incomplete, not

properly signed, or contrary to the instructions and requirements contained in the RFP may be rejected by the church. **Conditional proposals will not be accepted.**

**SECTION 1.09 TAX EXEMPTION**

Purchases of goods and services by the Church are exempt from the payment of Federal excise taxes and the Massachusetts sales tax, and any such taxes must not be included in the price computations.

**SECTION 1.10 CONTRACT ASSIGNMENT**

The successful contractor will not be permitted to assign or underlet the contract, nor assign either legal or equitably, any monies hereunder, or its claim thereto, without the previous written consent of the Church.

**SECTION 2.00 STANDARD TERMS AND CONDITIONS**

#### **SECTION 2.01 PROPOSAL REJECTION**

The Church reserves the right to reject any and all proposals or to accept that which is deemed in the best interest of the Church.

#### **SECTION 2.02 RIGHT TO WAIVE**

The Church reserves the right to waive any “**minor informalities**” or allow the vendor to correct them.

#### **SECTION 2.03 SUBSTITUTIONS**

When a proposer wishes to substitute for specified item or task, complete specifications or description for the substituted item(s) or task(s) and any evidence necessary to verify the quality, effectiveness and RFP compliance must be included. The Church will determine compliance and acceptability.

#### **SECTION 2.04 EQUAL OPPORTUNITY**

It is understood and agreed that it shall be a material breach of any contract resulting from this proposal for the Contractor to engage in any practice which shall violate any provision of Massachusetts General Laws, Chapter 151B, relative to discrimination in hiring, discharging, compensation, or terms, conditions or privileges of employment because of race, color, religion, creed, national origin, sex, age or ancestry.

#### **SECTION 2.05 PROPOSAL EFFECTIVE DATE**

The proposal will remain in effect for a period of 30 days from the deadline for submission of proposals or until it is formally withdrawn, a contract is executed or this RFP is canceled, whichever occurs first.

#### **SECTION 2.06 CONTRACT DURATION**

See schedule in Section 6, Scope of Services.

#### **SECTION 2.07 CANCELLATION**

The Church will have the option to cancel the contract provided that written notice is given 10 days prior to the effective termination date.

## **SECTION 3.00 RFP SPECIFICATIONS**

### **SECTION 3.01 RFP PACKAGING**

Two separate sealed envelopes, one containing two copies of the non-price technical proposal marked "St. John's Housing Feasibility Study (non-price)," and one containing two copies of the price proposal marked "Price Proposal - "St. John's Housing Feasibility Study" must be received by Church, 48 Middle St. Gloucester, MA. 01930, prior to XXX XX, 2015.

### **SECTION 3.02 PRICE SUMMARY FORMS**

The Price Summary Forms must be completed. No substitute form will be accepted. Pricing must remain firm throughout the contract. The Price Summary Forms must be submitted under separate cover to the Church. The responding party should make no reference to pricing in the technical portion of the proposal. Failure to adhere to this will result in disqualification of proposal.

### **SECTION 3.03 QUESTION AND RESPONSES**

All interpretations of the RFP and supplemental instructions will be in the form of written addenda to the RFP specifications. Requests for clarification or any questions about information contained in the RFP should be addressed in writing or faxed to Chair, Housing. Any information sent to one proposer will be available to all proposers. No requests or questions will be accepted after **1 p.m. on XXX XX, 2015** . To receive the responses to any questions submitted by other responding parties, please send the name, address, telephone number and fax number (if any) of the person to whom this information should be sent.

## **SECTION 4.00 SPECIAL RFP SPECIFICATION**

### **SECTION 4.01 INTRODUCTION**

All information in the proposal should be organized and presented as directed below. The proposal should provide a straightforward and **concise** description of the responding party's commitment and ability to perform the consulting services described in this document. To expedite the evaluation of proposals, it is essential that the responding party strictly adhere to the instructions. A proposal may be deemed to be non-responsive, at the Housing Feasibility Study Committee's discretion, if a responding party fails to comply with the following instructions.

### **SECTION 4.02 PROPOSAL QUESTIONNAIRE**

The questionnaire in the Section 5 must be completed. Please use the form provided in this document. This section is a portion of the evaluation criteria

### **SECTION 4.03 COMPARATIVE EVALUATION CRITERIA**

This portion of the proposal is intended to present a description of the responding party's qualification. The responding party's should respond briefly to item listed in Section 8 Comparative Evaluation Criteria, and included all requested documentation. When preparing this portion of the proposal, the respondent should clearly identify and respond to each evaluation criteria.

**SECTION 5.00****QUESTIONNAIRE****RFP No: # (2015-001)****Church's Project Description:** *Feasibility study for housing on church property***Name of Firm/Individual:** \_\_\_\_\_**Address:** \_\_\_\_\_**Type of Organization** (Proprietorship, Partnership, Corporation, etc.): \_\_\_\_\_**Year Established:** \_\_\_\_\_**Federal ID Number:** \_\_\_\_\_**Is your Firm SOMBA certified (MBE)** \_\_\_\_\_**Is your Firm SOMBA certified (WBE)** \_\_\_\_\_**Name & Title of Principal to contact** \_\_\_\_\_**Principal contact's telephone number** \_\_\_\_\_**Principal contact's Fax Number** \_\_\_\_\_**Principal contact's email address** \_\_\_\_\_**Principal Business of this Firm and Principal Specialization:**

---

---

---

**14 Names & Titles of all Partners or Directors**

---

---

---

---

**Key Persons, Specialists and Individuals in your firm to be assigned to this project:***Name & Title* \_\_\_\_\_ *Discipline/Project Role* \_\_\_\_\_*Est. Project Hours* \_\_\_\_\_ *Project Manager (requirement)* \_\_\_\_\_*Name & Title* \_\_\_\_\_ *Discipline/Project Role* \_\_\_\_\_*Est. Project Hours* \_\_\_\_\_**Recent Projects Best Illustrating Current Qualifications for this Project:***Project Name* \_\_\_\_\_*Location, Description* \_\_\_\_\_*Project Cost or Study Fee* \_\_\_\_\_ *Year Completed* \_\_\_\_\_**References***Name* \_\_\_\_\_ *Phone* \_\_\_\_\_*Name* \_\_\_\_\_ *Phone* \_\_\_\_\_**Recent Projects Best Illustrating Current Qualifications for this Project:***Project Name* \_\_\_\_\_*Location, Description* \_\_\_\_\_*Project Cost or Study Fee* \_\_\_\_\_ *Year Completed* \_\_\_\_\_



***References***

***Name*** \_\_\_\_\_ ***Phone*** \_\_\_\_\_

***Name*** \_\_\_\_\_ ***Phone*** \_\_\_\_\_

**Additional Information or Description of Resources Supporting Your Firm's Qualifications for this Project:**

---

---

---

*The foregoing statement of facts, is attested to by the undersigned .*

**Signature**

---

**Printed Name and Title** \_\_\_\_\_ **Date** \_\_\_\_\_

*Note: If additional space is necessary, please attach additional 8 ½ x 11 sheets to this questionnaire (Section 5).*

## **SECTION 6.00 SCOPE OF SERVICES SPECIFICATIONS**

### **BACKGROUND:**

In 20XX, the Church did a preliminary study of the feasibility of constructing low- to moderate-income housing over its parking lot located on three contiguous lots at 33, 35 and 35R Washington Street in Gloucester, Mass. That study resulted in the church commissioning a survey of the property to determine lot lines and any entailments on the property. The findings of the study and results of that survey are attached to this RFP as Appendix A.

The Church would now like to proceed to the next step in our process, a formal, detailed feasibility study the scope of which is detailed below. The goal is for the church to be able to make a formal decision on whether or not to proceed with the project.

### **Scope of the Feasibility Study**

The selected study will be carried out in the fall/winter of 2015-2016 and should provide detailed information and analysis as follows:

1. Evaluate the Gloucester's existing Zoning Ordinance as it applies to the site, required variances or Special Permits required, and an anticipated time schedule to complete local approvals.
2. Identify the maximum number of units that can be reasonably supported at the site given zoning, financing, and surrounding density.
3. Estimate total development costs associated with development and potential sources of front end capital, and equity financing.
4. Determine the ongoing revenue St. John's could recognize on an annual basis once the project is completed.
5. Provide an analysis of potential ownership/partnership options for the future ownership and operation of the completed project.
6. Research and provide examples of other successfully completed and operational housing projects of similar size and/or involving church sponsorship, particularly within a couple of hours drive from Gloucester.
7. Identify sources of public/private financing for the project--especially grants, tax credit-based investment, and private partnerships.
8. Identify and suggest strategies to deal with environmental, legal and permitting issues associated with the proposed development.
9. Identify the church's expected financial or in-kind contributions to the project.
10. Provide the economic development strategic plan for the proposed housing including Whether or not the housing should include market rate units
11. Social considerations:
  - a. Proposed use should be consistent with the church's social action objectives
  - b. Proposed use should be consistent with community housing objectives – specifically the creation of low- to moderate-income housing.
12. In addition the feasibility study should examine the following possibilities:
  - a. Continued use of the church's property as a parking lot beneath the proposed building.
  - b. Use of one of the units in the proposed development as a rectory.
  - c. The possibility of leasing of the parking facility to the city of Gloucester for use as a municipal parking lot.
  - d. The inclusion of commercial space within the building at street level on Washington Street.
  - e. Additional church facilities within the building.

## **SECTION 6.01 DEFINITION OF TERMS**

Project: Housing Feasibility Study  
Owner: St. John's Episcopal Church  
Owner's Rep: Chair, Housing Feasibility Study Committee  
48 Middle Street  
Gloucester, MA 01930  
978-282-8017  
betsy@stjohnsgloucester.org

## **SECTION 6.02 RESPONSIBILITIES OF THE CHURCH**

### **Process of Development and Operations of the Contract**

1. The Church will be responsible for the selection of the Contractor for this project. A selection committee will evaluate the proposals and select the Contractor. The church may require interviews with Proposers as part of the selection process.
2. The Church will work with the Contractor to determine the preferred scope and focus for plan revision, facilitate Contractor efforts, oversee development of the required deliverables and monitor the progress of all contract work.
3. To ensure progress and conformity to the contract and to offer opportunities to provide information and guidance useful in development of the deliverables, the Church and/or its representative, the Chair of the Housing Feasibility Study Committee, will meet regularly with the Contractor.
4. The Church (and/or its agent, the Chair of the Housing Feasibility Study Committee) will be responsible for review and comment on draft deliverables, for distribution of materials, and for organization of meetings. The Chair of the Housing Feasibility Study Committee will also assist, as needed and appropriate, in data collection required to produce a credible/useful end product.

## **SECTION 6.03 PRE RESPONSE MEETING (IF NECESSARY)**

Date and Time: XXX XX, 2015 @ 11 a.m.  
Place: St. John's Episcopal Church,  
48 Middle St. Gloucester MA 01930  
Contact: Chair,  
Housing Feasibility Study Committee  
Tel. 978-283-1708

## **SECTION 6.04 RESPONSIBILITY AND SERVICES TO BE PERFORMED UNDER THE BASIC FEE**

The responding party should describe in detail the approach and specific services that will be required to deliver the desired outcomes stated in Section 6.00, Scope of Services

The responding party should also provide a schedule and timeline for the work. All deliverables should be provided electronically. Two hard copies of the plan should then be provided for the following:

Wardens c/o St. John's Episcopal Church 48 Middle St. Gloucester MA 01930

Housing Feasibility Study Committee c/o St. John's Episcopal Church 48 Middle St. Gloucester MA 01930

## **SECTION 6.05 PAYMENT SCHEDULE:**

Responding party must provide a payment schedule based upon deliverables of the contract.

## **SECTION 6.07 PROJECT MANAGER FOR SAINT JOHN'S CHURCH**

Chair of the Housing Feasibility Study Committee  
48 Middle Street, Gloucester, MA 01930  
PH 978-283-1708 Fax 978-283-1770

## **SECTION 6.08 QUALITY REQUIREMENTS**

**Questionnaire Form (Section 5):** Proposers must designate a project manager and provide a detailed description of his/her qualifications, the expertise of their organization, and those personnel who will be working on the project. The proposal should highlight the manner in which this experience relates to previous similar benefit advisory projects. The

proposal must also indicate clearly the approximate number of hours each of these key personnel will devote to each task of the project and that the contractor has sufficient resources to complete the project in the time frame specified. Additional pages may be added if necessary.

## **SECTION 7.00 PROPOSAL EVALUATION INFORMATION**

### **SECTION 7.01 RATING COMPARATIVE CRITERIA**

All proposals will be reviewed in accordance with the requirements and goals of the Church.

### **SECTION 7.02 INTERVIEWS**

Interviews may be required at the Church's discretion after review of the technical proposals. Proposers to be interviewed will be provided with advance notice of at least two (2) working days. Presentations should not exceed twenty minutes in length, with a question and answer period to follow.

## **SECTION 8.00 COMPARATIVE EVALUATION CRITERIA**

### **8.01 REFERENCES**

Must provide a list of at least two (2) references, that can be contacted during the RFP process. At least two (2) of the references must be customers for which proposer is providing services similar to those outlined in the RFP.

Include the customer name, contact person, his/her title, address and telephone number. (*Complete Questionnaire Form – Section 5*)

#### *Highly Advantageous*

References that highlight strengths of the firm or the project manager that are particularly suited to the stated specific project needs for this Feasibility Study.  
Contact information complete

#### *Advantageous*

References that show competency of either the firm and the project manager proposed for this project, but are on projects not quite comparable to this Feasibility Study.  
Contact information complete

#### *Not Advantageous*

References that cannot speak to the competencies required by the scope of services.  
Contact information complete.

#### *Not Acceptable*

References that show weaknesses in the firm or the project manager competencies relevant to outcomes desired for the Feasibility Study.  
Incomplete contact information that is not corrected.

## **SECTION 8.02 REPORTED QUALITY OF WORK ON PREVIOUS PROJECTS**

#### *Highly Advantageous*

All reference checks resulted in positive comments or reports concerning the quality of work

#### *Advantageous*

Reference checks resulted in more positive than negative comments or reports concerning the quality of work

#### *Not Advantageous*

Reference checks resulted in more negative than positive comments or reports concerning the quality of work

#### *Not Acceptable*

The negative aspects of the references would particularly impact this project.

## **SECTION 8.03 COMPLETENESS OF PROPOSAL**

#### *Highly Advantageous*

All Quality Requirements, Questionnaire, Comparative Criteria and forms submitted complete and as requested in the RFP

#### *Advantageous*

All Quality Requirements, Questionnaire, Comparative Criteria and forms submitted complete and as requested in the RFP with minor informalities.

#### *Not Advantageous*

Quality Requirements, Questionnaire, Comparative Criteria and forms submitted incomplete and not in the form requested in the RFP

*Not Acceptable*

Nonresponsive to scope, schedule or other sections of the proposal.

## SECTION 8.04: EXPERIENCE OF THE FIRM

### *Highly Advantageous*

Demonstrated excellence with both design and development of multi-family low- to moderate-income housing. Sufficient resources and expertise to ensure completion of scope.

### *Advantageous*

Demonstrated excellence with both design and development of multi-family low- to moderate-income housing. Sufficient resources and expertise to ensure completion of scope.

### *Not Advantageous*

Lacking experience either design and development of multi-family low- to moderate-income housing, but having other planning experience.

### *Not Acceptable*

Lacking planning experience or sufficient resources and expertise to ensure completion of scope.

## SECTION 8.05: EXPERIENCE OF THE PROJECT MANAGER

### *Highly Advantageous*

Project manager has managed with excellence projects with both design and development of multi-family low- to moderate-income housing for non-profit organizations. Project manager has previous experience with planning for non-profit organizations in the area of housing.

### *Advantageous*

Project manager has managed with excellence projects with both design and development of multi-family low- to moderate-income housing for non-profit organizations. Project manager shows knowledge and experience with housing development and implementation strategies.

### *Not Advantageous*

Project manager does not have experience with both design and development of multi-family low- to moderate-income housing for non-profit organizations.

### *Not Acceptable*

Project manager has no experience with either design and development of multi-family low- to moderate-income housing.

**SECTION 9.00      FORMS TO BE COMPLETED AND INCLUDED IN THE TECHNICAL PROPOSAL PACKAGE**

**SECTION 9.01      ACKNOWLEDGMENT OF ADDENDA**

Each responding party shall acknowledge the receipt of any addenda by signing and including it in their bid submission.

**SECTION 9.02      QUESTIONNAIRE FORM**

**SECTION 9.03      INFORMATION**

Any other information that the vendor wishes to include that will document their capabilities and qualifications for providing the services sought in this RFP.

**SECTION 9.04      AUTHORIZED SIGNATURE PAGE**

**SECTION 9.05      RESUMES OF KEY PERSONNEL ASSIGNED**

**Bid Form "A"**

**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalty of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals.

Responding party:

Address:

Authorized Signature

Title:

Telephone

Fax

**Bid Form "B"**

**TAX COMPLIANCE**

**IF A CORPORATION:**

State in which Incorporated

President

Treasurer

Secretary

If a foreign (out of State) corporation - are you registered to do business in Massachusetts? YES \_\_\_\_ NO \_\_\_\_\_. If you are selected for this work, you are required under Massachusetts General Law Chapter 38D, to obtain from the Secretary of State, Foreign Corp. Section, State House, Boston, a certificate to the awarding authority prior to award.

**IF A PARTNERSHIP (Name All Partners):**

Name

Address

City

State/Zip

**IF AN INDIVIDUAL:**

Name

Address

City

State/Zip

**IF AN INDIVIDUAL DOING BUSINESS UNDER A FIRM NAME:**

Name of Firm

Business Address

City

State/Zip

**SECTION 10.00 FORM TO BE COMPLETED AND INCLUDED IN THE PRICE PROPOSAL PACKAGE**

All vendors shall submit bids in strict accordance with the submission requirements listed below. Any vendors failing to provide all of the following submission requirements will be considered “not responsive” and their proposal may be rejected without further consideration

**SECTION 10.01 PRICE SUMMARY FORM**

Consulting Services	Hourly Rate or Unit Rate	Est. Hours Or Units	Cost
Payroll: Project Manager			
Payroll: <i>(Insert Title)</i>			
Payroll: <i>(Insert Title)</i>			
Payroll: <i>(Insert Title)</i>			
Payroll: <i>(Insert Title)</i>			
Payroll: <i>(Insert Title)</i>			
Travel			
Printing			
Other			
Other			
Award Line		Total Cost >>	

**SECTION 10.02 METHOD OF AWARD**

One contract will be awarded on the Total Cost.

**SECTION 10.03 CHARGES NOT INCLUDED IN THE PROPOSAL**

The Church will not pay for any charges not included herein.



**St. John's Episcopal Church  
Housing Feasibility Study  
Request for Proposals # 2015-001  
Due XXX XX, 2015, @ 11 A.M.**

The undersigned hereby proposes to furnish all necessary services required in RFP #2015-001 for **Housing Feasibility Study** for St. John's Episcopal Church in accordance with the attached specifications and quoted price proposal schedule.

Name of Firm

---

Authorized Signature and Title

---

Address

---

---

---

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

**TECHNICAL PROPOSAL**

- ☐ Bid sealed, signed and marked as required
- ☐ Questionnaire Form (Section 5), completed
- ☐ Addenda Receipt Acknowledged
- ☐ Authorized Signature Form
- ☐ Résumés attached

**PRICE PROPOSAL**

- ☐ Price Proposal Form, completed

St. John's Episcopal Church, 48 Middle St., Gloucester, MA. 01930  
Tel: 978-283-1708, Fax: 978-283-1770, email: [housing@stjohnsgloucester.org](mailto:housing@stjohnsgloucester.org)

## ATTACHMENT C: RECORDS OF OWNERSHIP OF PROPERTY

**MAP ID: 15/ 102/ / /**

**State Use: 960V**

Print Date: 12/22/2014 11:04

CURRENT OWNER				TOPO.		UTILITIES		STRT./ROAD		LOCATION		CURRENT ASSESSMENT												
RECTOR WARDENS & VESTRY  48 MIDDLE ST  GLOUCESTER, MA 01930 0000 Additional Owners:												Description		Code		Appraised Value		Assessed Value		108 GLOUCESTER, MA   <b>VISION</b>				
												EXM LAND		9600		75,300		75,300						
												EXEMPT		9600		2,500		2,500						
SUPPLEMENTAL DATA																								
Other ID: 0015 0102 001 SUB-DIV PP ACCT WARD PREC.  GIS ID: 965										ASSOC PID#														
										Total77,80077,800														
RECORD OF OWNERSHIP				BK-VOL/PAGE		SALE DATE		q/u	v/i	SALE PRICE		V.C.		PREVIOUS ASSESSMENTS (HISTORY)										
RECTOR WARDENS & VESTRY				5496/ 604		12/01/1967		U	I			1	00	Yr.	Code	Assessed Value	Yr.	Code	Assessed Value	Yr.	Code	Assessed Value		
														2014	9600	75,300	2013	9600	82,200	2012	9600	83,800		
														2014	9600	2,500	2013	9600	2,600					
														Total:			77,800	Total:	84,800	Total:	83,800			
EXEMPTIONS				OTHER ASSESSMENTS												This signature acknowledges a visit by a Data Collector or Assessor								
Year	Type	Description		Amount	Code	Description		Number	Amount	Comm. Int.														
Total:																APPRAISED VALUE SUMMARY								
																Appraised Bldg. Value (Card)0								
																Appraised XF (B) Value (Bldg)0								
																Appraised OB (L) Value (Bldg)2,500								
																Appraised Land Value (Bldg)75,300								
																Special Land Value0								
																Total Appraised Parcel Value77,800								
																Valuation Method:C								
																Adjustment:0								
																Net Total Appraised Parcel Value77,800								
BUILDING PERMIT RECORD														VISIT/ CHANGE HISTORY										
Permit ID		Issue Date		Type	Description		Amount	Insp. Date	% Comp.	Date Comp.		Comments		Date	Type	IS	ID	Cd.	Purpose/Result					
														6/15/2012 1/1/1987	01		GJ AS	IN SR	INTERIOR INSPECTION/ ASSESSOR					
LAND LINE VALUATION SECTION																								
B #	Use Code	Use Description		Zone	D	Frontage	Depth	Units	Unit Price	L Factor	S.A.	Acre Disc	C. Factor	ST. Idx	Adj.	Notes- Adj		Special Pricing		Adj. Unit Price	Land Value			
1	960V	RG VACANT		R-5				3,160 SF	23.84	1.00	5	1.0000	1.00	1	1.00					23.84	75,300			
Total Card Land Units:								0.07 AC	Parcel Total Land Area:0.07 AC								Total Land Value:75,300							

**State Use: 960V**

Print Date: 12/22/2014 11:03

CURRENT OWNER				TOPO.		UTILITIES		STRT/ROAD		LOCATION		CURRENT ASSESSMENT								108 GLOUCESTER, MA  	
---------------	--	--	--	-------	--	-----------	--	-----------	--	----------	--	--------------------	--	--	--	--	--	--	--	---	--

Property Location: 35R WASHINGTON ST  
Vision ID: 973

MAP ID: 15/ 108/ / /

Bldg Name:

State Use: 960V

Account #

Bldg #: 1 of 1

Sec #: 1 of 1 Card 1 of 1

Print Date: 12/22/2014 11:04

<b>CURRENT OWNER</b>		<b>TOPO.</b>	<b>UTILITIES</b>	<b>STRT./ROAD</b>	<b>LOCATION</b>	<b>CURRENT ASSESSMENT</b>								<b>108 GLOUCESTER, MA</b>  <b>VISION</b>					
ST JOHN'S EPISCOPAL CHURCH C/O RECTOR WARDENS & VESTRY 48 MIDDLE ST  GLOUCESTER, MA 01930 0000 Additional Owners:						Description	Code	Appraised Value	Assessed Value										
						EXM LAND	9600	79,500	79,500										
						EXEMPT	9600	3,200	3,200										
<b>SUPPLEMENTAL DATA</b>																			
Other ID: 0015 0108 001 SUB-DIV PP ACCT WARD PREC.  GIS ID: 973						ASSOC PID#						Total	82,700	82,700					
<b>RECORD OF OWNERSHIP</b>		<b>BK-VOL/PAGE</b>	<b>SALE DATE</b>	<b>q/u</b>	<b>v/i</b>	<b>SALE PRICE</b>	<b>V.C.</b>	<b>PREVIOUS ASSESSMENTS (HISTORY)</b>											
ST JOHN'S EPISCOPAL CHURCH		5241/ 340	01/27/1965				0	Yr.	Code	Assessed Value	Yr.	Code	Assessed Value	Yr.	Code	Assessed Value			
								2014	9600	79,500	2013	9600	85,600	2012	9600	87,300			
								2014	9600	3,200	2013	9600	3,300						
								Total:	82,700	Total:	88,900	Total:	87,300						
<b>EXEMPTIONS</b>		<b>OTHER ASSESSMENTS</b>						<b>This signature acknowledges a visit by a Data Collector or Assessor</b>											
Year	Type	Description	Amount	Code	Description	Number	Amount	Comm. Int.											
		Total:								<b>APPRAISED VALUE SUMMARY</b>									
										Appraised Bldg. Value (Card) 0									
										Appraised XF (B) Value (Bldg) 0									
										Appraised OB (L) Value (Bldg) 3,200									
										Appraised Land Value (Bldg) 79,500									
										Special Land Value 0									
										Total Appraised Parcel Value 82,700									
										Valuation Method: C									
										Adjustment: 0									
										Net Total Appraised Parcel Value 82,700									
<b>BUILDING PERMIT RECORD</b>										<b>VISIT/ CHANGE HISTORY</b>									
Permit ID	Issue Date	Type	Description	Amount	Insp. Date	% Comp.	Date Comp.	Comments	Date	Type	IS	ID	Cd.	Purpose/Result					
									6/22/2012 1/1/1987			GJ AS	EX SR	EXTERIOR INSPECTIO ASSESSOR					
<b>LAND LINE VALUATION SECTION</b>																			
B #	Use Code	Use Description	Zone	D	Frontage	Depth	Units	Unit Price	I. Factor	S.A.	Acre Disc	C. Factor	ST. Idx	Adj.	Notes- Adj	Special Pricing	Adj. Unit Price	Land Value	
1	960V	RG VACANT	R-5				4,082	SF	19.47	1.00	5	1.0000	1.00	1	1.00		19.47	79,500	
Total Card Land Units:							0.09	AC	Parcel Total Land Area: 0.09 AC							Total Land Value:			79,500

KNOW ALL MEN BY THESE PRESENTS, that I, CATHERINE PARCO, widow,

of Gloucester, Essex County, Massachusetts,  
~~being unmarried~~, for consideration paid, grant to RECTOR, WARDENS AND VESTRY OF ST.  
 JOHN'S EPISCOPAL CHURCH OF GLOUCESTER, MASS., INC., a Massachusetts  
 religious corporation situated at 48 Middle Street, in said Gloucester, with  
 QUITCLAIM COVENANTS, the land in Gloucester, Essex County, Massachusetts,  
 hereinafter described:

A certain parcel of land situated on the Easterly side of Washington Street in  
 said Gloucester and being shown on a plan recorded in Book 2866, Page 541 and  
 said parcel being more particularly bounded and described as follows:

WESTERLY by Washington Street, 51.80 feet;

NORTHERLY by land formerly of DeLotto, now or late of Lowe, 67.25 feet;

EASTERLY by land formerly of DeLotto, now or late of Lowe, 47.10 feet; and

SOUTHERLY by land now or late of Trupiano, 61.0 feet.

Being the same premises conveyed to the grantor herein by deed of Theresa L.  
 York, dated May 22, 1953, recorded in Book 3979, Page 496 in the Essex South  
 District Registry of Deeds, and being number 33 Washington Street according to  
 the present numbering in the City of Gloucester.

Witness my hand and seal this 4th day of December 1967.

Mass. Excise Stamps \$ 13.14 affixed  
 and cancelled on back of this instrument

U. S. Docum. Stamps \$ 12.65 affixed  
 and cancelled on back of this instrument

Catherine Parco  
 Catherine Parco

The Commonwealth of Massachusetts

Then personally appeared the above named

Essex, ss. December 4, 1967.  
 Catherine Parco

and acknowledged the foregoing instrument to be her free act and deed,  
 before me,

Clifford J. Foley  
 Notary Public - JAMES H. FOLEY

My commission expires Dec. 8, 1972

Essex ss. Recorded Dec. 6, 1967. 15 m. past 8 A. M. #17

KNOW ALL MEN BY THESE PRESENTS, that I, CHARLES H. LOWE, JR.

of Gloucester, Essex County, Massachusetts,  
~~for consideration paid, grant to~~ RECTOR, WARDENS AND VESTRY OF ST. JOHN'S  
 EPISCOPAL CHURCH OF GLOUCESTER, MASS., INC., a Massachusetts religious  
 corporation, situated at 48 Middle St., Gloucester, with  
 QUITCLAIM COVENANTS, the land in Gloucester, Essex County, Massachusetts,  
 hereinafter described:

A certain parcel of land situated on the Easterly side of Washington Street and shown  
 as Lot A on plan recorded as Plan 76 in Plan Book 103, bounded and described as follows:

WESTERLY by Washington Street, 1.20 feet;  
 NORTHERLY by a portion of said Washington Street, 24 feet;  
 WESTERLY again by Washington Street, 9.37 feet;  
 NORTHERLY on two courses measuring 30.50 feet and 113.13 feet by land of the  
 City of Gloucester;  
 EASTERLY by Lot B, as shown on said plan, on two courses measuring 15.20 feet  
 and 71.81 feet;  
 SOUTHERLY by land now or late of Aiello on two courses measuring 1.80 feet and  
 27.58 feet;  
 WESTERLY by land now or late of Troupiano, 10 feet;  
 SOUTHERLY by said land of Troupiano, 49.12 feet;  
 WESTERLY by land of said grantee, 47 feet; and  
 SOUTHERLY by land of said grantee, 67.25 feet.

Together with, as appurtenant thereto, all the grantor's right, title and interest  
 in and to the property lying between Washington Street and the western most boundary  
 line of said premises.

The grantor also releases to the grantee all reservations reserved in a deed from  
 the grantor to the grantee recorded in Book 5241, Page 340, and the grantor also  
 conveys any and all rights and easements over said property to the grantee.

Being a portion of the premises described in deed of Howard A. DeLotto to the  
 grantor herein, dated November 29, 1961, recorded in Book 4852, Page 102 in the  
 Essex South District Registry of Deeds.

Mass. Excise Stamp \$ 7.60 affixed  
 and cancelled on back of this instrument

U. S. Docum. Stamp \$ 7.15 affixed  
 and cancelled on back of this instrument

Witness my hand and seal this 27th day of December 19 67.

*Charles H. Lowe, Jr.*

*Charles H. Lowe, Jr.*  
 Charles H. Lowe, Jr.



The Commonwealth of Massachusetts

Essex, ss. Gloucester, Dec. 27, 1967.

Then personally appeared the above named Charles H. Lowe, Jr.

and acknowledged the foregoing instrument to be his free act and deed,  
 before me,

*Elliot L. Landon*  
 Notary Public in and for the State of Massachusetts  
 My Commission Expires 1968



RECORDED

Essex ss. Recorded Dec. 29, 1967. 28 m. past 8 A.M. #12

& Plan  
See Pl. Bk. 103  
Pl. 76

KNOW ALL MEN BY THESE PRESENTS, that I, CHARLES H. LOWE, JR., married to Sara M. Lowe, of Gloucester, Essex County, Massachusetts, for consideration paid, grant to RECTOR, WARDENS AND VESTRY OF ST. JOHN'S EPISCOPAL CHURCH OF GLOUCESTER, MASS., INC., a Massachusetts religious corporation, situated in said Gloucester, with QUITCLAIM COVENANTS, a certain parcel of land shown as Lot B on a plan entitled "Plan of Land in Gloucester Property of Charles H. Lowe, Jr." dated August 24, 1962, Essex Survey Service, to be recorded herewith and said parcel being more particularly bounded and described as follows:

NORTHERLY by land now or late of Ursula Ann Bono et al, 69.38 feet;  
EASTERLY by the center line of a way leading Southerly from Gould Court, 63.03 feet;  
SOUTHERLY by land of the grantee, 15 feet;  
EASTERLY by land of the grantee, 4.99 feet;  
SOUTHERLY by land of John Aiello et ux, 30.20 feet;  
WESTERLY by Lot A, as shown on said plan, 71.81 feet; and  
WESTERLY by land of the City of Gloucester, 8.98 feet.

Containing approximately 4,082 square feet.

Together with as appurtenant thereto the right to use the right of way extending Easterly from Washington Street to the granted premises for all the usual purposes for which public ways are commonly used in the City of Gloucester, including, but not limiting the generality of the foregoing, the right to install and maintain in, on or over said way, sewer, water, electric, gas, telephone and all other utilities.

It is intended to convey and is hereby conveyed all of my right, title and interest in and to the private way situated on the Easterly side of the granted premises which leads Southerly from Gould Court intending and hereby releasing and abandoning any and all easements in and to said way, except only such easements as are hereinafter specifically reserved.

The grantor reserves, as appurtenant to Lot A, an easement to maintain over Lot B and said private way last above described, water, electrical and sewer services in their present location provided, however, that the grantee shall have the right, at its own expense, at any time, to relocate the location of the above services and provided further that if it is necessary for the grantor to excavate for the repair and maintenance of said services that he will restore the premises to the same condition as existed prior to the excavation.

Reference may be had to variance granted by the Board of Appeals to the Gloucester Zoning Ordinance and dated January 6, 1965, duly recorded in said Registry.



## ATTACHMENT D: PHOTO OF PROPERTY



# ATTACHMENT E: LETTERS IN SUPPORT OF PROJECT

**ACTION** INC.  
180 Main Street  
Gloucester, MA 01930

Tel: 978-282-1000  
Fax: 978-283-0523  
www.actioninc.org

March 13, 2015

Community Preservation Committee  
City of Gloucester  
9 Dale Avenue  
Gloucester, MA 01930

Dear Committee Members:

I am writing in support of the St. John's Episcopal Church application to fund a feasibility study for affordable housing development on Washington Street.

In 2014 Action Inc. conducted a comprehensive Community Needs Assessment which identified affordable housing as the number one need in our service area. On a daily basis, the majority of people who come to Action for assistance need help finding, or holding on to, an affordable place to live.

Although Action, Inc. is submitting its own application under this CPA funding cycle, we know that effectively addressing affordable housing requires a comprehensive approach. In order to tackle the problem, Gloucester needs more rental assistance and more bricks and mortar projects. The demand for affordable housing is significant and requires a range of solutions to even begin to meet the need. We are in favor of St. John's effort to increase the affordable housing stock in Gloucester.

Sincerely,

  
Peggy Hegarty-Steck  
Deputy Director



Client & Housing Services ■ COMPASS Youth Program  
Energy Services ■ HomeCare ■ Job Training & Education

# ATTACHMENT F: COST ESTIMATES

KIRK NOYES 1 WOODBURY STREET, GLOUCESTER, MA 01930

978-281-1211

e-mail: rknoyes@gmail.com

March 12, 2015

Mr. Paul McGeary  
St. John's Episcopal Church  
48 Middle Street,  
Gloucester, MA 019340

RE: RFP for consulting work on affordable housing feasibility

Dear Paul,

I have reviewed the church's RFP seeking consulting services to assist you with a feasibility analysis of the St. John's property for potential expanded use for affordable housing.

My suggestion is that you budget something like \$20,000 for this work. If I were taking on this job, that is a number that should provide reasonable compensation for the tasks required under the terms of the RFP.

If I can be of any further assistance, do not hesitate to ask.

Sincerely,

A handwritten signature in dark ink, appearing to read "Kirk", written over the word "Sincerely,".

R. Kirk Noyes

Hello Paul,

I did get your voicemail and yes \$20,000 should be a fair number for a feasibility study. My math was coming in close to that number. I also called Jonathan Poore, who I consider my mentor, to see if he would be willing to do some occasional spot consulting on the project. He said he would be happy to, and I have figured that into my math.

Please note though that my company is small and has little overhead so I tend to be cheaper than most. If you are putting this out for bid by other firms, larger firms, they may come in much higher. I just do not want you to get caught short financially. I do not know how to advise you on that issue. This is an attractive potential project so other, larger, firms may be willing to work for that number with the chance the study could lead to a real project with a larger payday.

Thanks,  
Rob

Robert Gulla  
Architecture  
Registered Architect  
ph./ fax 978-282-1933  
[rgulla@robertgulla.com](mailto:rgulla@robertgulla.com)